

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

Group Art Unit: Unknown

Examiner: Unknown

In re Patent Application of:

Applicant : David S. MILLER)
Application No. : Unknown)
Filed : February 6, 2001)
For : FULLY-AUTOMATED)
SYSTEM FOR TAX REPORTING,)
PAYMENT AND REFUND)
Attorney Docket No. : 31921-169140)

**PRELIMINARY
AMENDMENT**

February 6, 2001

Assistant Commissioner for Patents

Washington, D.C. 20231

ATTENTION: BOX PATENT APPLICATION

Sir:

Prior to commencing examination, please amend the application as follows:

IN THE SPECIFICATION:

Page 2, line 2, insert --This application claims the priority of U.S. Provisional Patent Application No. 60/045,945, filed May 8, 1997, and U.S. Patent Application No. 09/073,027, filed May 7, 1998.--

IN THE CLAIMS:

Please cancel claims 1-20.

Please add claims 21-41 as follows:

--21. An apparatus comprising:

means for connecting electronically an electronic intermediary to a tax data provider;

means for collecting electronically tax data from said tax data provider;

means for processing electronically said tax data collected from said tax data provider to obtain processed tax data; and

means for preparing electronically an electronic tax return using said processed tax data.

22. An apparatus as in claim 21, wherein said means for connecting electronically an electronic intermediary to a tax data provider uses an electronic link, and wherein means for collecting electronically tax data from said tax data provider uses an electronic link.

23. An apparatus as in claim 22, wherein said electronic link is an electronic data network.

24. An apparatus as in claim 23, wherein said electronic data network is the Internet.

25. An apparatus as in claim 21, wherein said tax data provider is an employer, a partnership, a bank, a savings and loan institution, a mortgage institution, a credit card bureau, a thrift institution, a securities brokerage firm, a mutual fund holding institution, or a charity.

26. A computer-readable medium embodying a computer program, said computer program comprising code segments for:

connecting electronically an electronic intermediary to a tax data provider;

collecting electronically tax data from said tax data provider;
processing electronically said tax data collected from said tax data provider to obtain
processed tax data; and
preparing electronically an electronic tax return using said processed tax data.

27. An apparatus comprising:

means for connecting electronically an electronic intermediary to a taxpayer; and
means for receiving electronically information on at least one tax data provider from said
taxpayer.

28. An apparatus as in claim 27, wherein said means for connecting electronically an
electronic intermediary to a taxpayer uses an electronic link, and wherein said means for
collecting electronically information on at least one tax data provider from said taxpayer uses an
electronic link.

29. An apparatus as in claim 28, wherein said electronic link is an electronic data
network.

30. An apparatus as in claim 29, wherein said electronic data network is the Internet.

31. An apparatus as in claim 27, wherein said at least one tax data provider is an
employer, a partnership, a bank, a savings and loan institution, a mortgage institution, a credit

card bureau, a thrift institution, a securities brokerage firm, a mutual fund holding institution, or a charity.

32. An apparatus as in claim 27, further comprising:

means for connecting electronically said electronic intermediary to one of said at least one tax data provider; and

means for collecting electronically tax data from said one of said at least one tax data provider.

33. An apparatus as in claim 32, further comprising:

means for processing electronically said tax data collected from said one of said at least one tax data provider to obtain processed tax data; and

means for preparing electronically an electronic tax return using said processed tax data.

34. A computer-readable medium embodying a computer program, said computer program comprising code segments for:

connecting electronically an electronic intermediary to a taxpayer; and

receiving electronically information on at least one tax data provider from said taxpayer.

35. A computer-readable medium as in claim 34, said computer program further comprising code segments for:

connecting electronically said electronic intermediary to one of said at least one tax data provider; and

collecting electronically tax data from said one of said at least one tax data provider.

36. A computer-readable medium as in claim 35, said computer program further comprising code segments for:

processing electronically said tax data collected from said one of said at least one tax data provider to obtain processed tax data; and

preparing electronically an electronic tax return using said processed tax data.

37. An apparatus comprising:

means for connecting electronically a tax data provider to an electronic intermediary; and

means for providing electronically tax data from said tax data provider to said electronic intermediary.

38. A computer-readable medium embodying a computer program, said computer program comprising code segments for:

connecting electronically a tax data provider to an electronic intermediary; and

providing electronically tax data from said tax data provider to said electronic intermediary.

39. An apparatus comprising:

means for connecting electronically a taxpayer to an electronic intermediary; and

means for providing electronically information on at least one tax data provider from said taxpayer to said electronic intermediary.

40. A method for automatic information reporting by an electronic intermediary comprising:

- connecting electronically said electronic intermediary to an information provider;
- collecting electronically information from said information provider;
- processing electronically the information collected electronically from said information provider to obtain processed information; and
- preparing electronically an electronic information report using the processed information.

41. The method according to claim 40, wherein said information provider comprises a tax data provider, said information comprises tax data, said processed information comprises processed tax data, and said electronic information report comprises an electronic tax return.--

REMARKS

The above amendments have been made to place the application in better form for examination. Applicant hereby requests an action on the merits at the earliest opportunity.

Respectfully submitted,



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